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August 26, 2010

ADDENDUM 1
TO
REQUEST FOR PROPOSALS
No. 10-001

TO FURNISH BENEFIT PLAN CONSULTING SERVICES

Responses to questions by offerors:

Q1. Page 5, Section One, 1.02, states contract begins July 1 or earlier. Can fees be revised if it starts earlier? When will notification be given as to the effective date?

A1. No. Fees cannot be revised if the contract starts earlier than July 1, 2011. At this time, it is unknown when notification will be given.

Q2. Page 8, Section One, 1.09, 1st paragraph, refers to "nineteen" copies even though 15 is noted in parenthesis. When the unbounded, single sided copy is added, it refers to "for a total of sixteen (16)? Which number of copies is correct?

A2. Each offeror must submit fifteen (15) copies and one single-sided unbound original of the offeror's proposal (for a total of sixteen [16]).

Q3. Page 8, Section One, 1.09, does the EUTF require a "soft copy" on a CD or DVD?

A3. The RFP does not require the offeror to submit a soft copy on CD or DVD.

Q4. Page 8, Section One, 1.09, Submission of Proposal, please confirm the number of copies required.

A4. (see A2 above).

Q5. Page 10, Section One, 1.16, does "most responsive to the RFP" refer to the offeror meeting every requirement in Section One, 1.13 to be considered "responsive" or is it the offeror that is most responsive to most of the requirements?

A5. Award will be made to the responsible offeror whose proposal is determined to be most advantageous taking into consideration price and evaluation factors set forth in the RFP.

Q6. Page 10, Section One, 1.17, we currently do not have any employees in the state of Hawaii. If awarded, would it be ok to provide the documents listed in this section after the effective date rather than with our proposal?

A6. The items listed in section 1.17 must be furnished prior to award of the contract.

Q7. Page 22, Section Four, Scope of Work, is the proposed scope of services identical to the current scope of services required by your current benefit consultant? If not, how does it differ?

A7. No. Potential offerors will need to make the comparison themselves.

Q8. Page 22, Section 4.02A, General Analysis and Evaluation of Existing Contract and Benefit Programs, please clearly define “on an ongoing basis” and quantify the number of reports expected to be produced. Traditionally, reporting of this nature is provided on a quarterly basis. Does the EUTF expect to request analysis more frequently than quarterly? Will the EUTF pay for additional analysis that exceeds the stated frequency covered in a consultant’s “Annual Fees”?

A8. The consultant will be expected to continually evaluate the EUTF benefit plans in all areas stated in section 4.02 A and apprise the Board of any recommended actions for the purpose as stated in section 4.02 A at each monthly Board meeting. A formal report to the Board shall be required for each calendar quarter. The EUTF will not pay additional monies for additional analysis that exceeds the stated frequency covered in the consultant’s annual fees.

Q9. Page 22, Section Four, 4.02A, 3rd paragraph, what does “on-going basis” mean? Monthly reports, quarterly reports?

A9. See A8 above.

Q10. Page 22, Section Four, 4.02B, 3rd paragraph, what is meant by the consultant addressing the requirements of HRS87A-15 that the plans be offered at a cost affordable to both the public employers and public employees?

A10. The consultant’s recommendations must take into consideration the fact that HRS 87A-15 requires the EUTF to offer plans that are at a cost affordable to both the public employees and public employers.

Q11. Page 23, Section 4.02B, EUTF Contracts and Benefit Plans, will the EUTF pay for additional analysis in excess of the stated frequency should there be multiple reviews due to circumstances out of the benefit consultant’s control, i.e. lack of quorum, no action taken, budget issues, etc?

A11. No. See A8 above.

Q12. Page 23, Section 4.02B, EUTF Contracts and Benefit Plans, regarding the direction to address the requirements of HRS 87A-15 regarding the affordability of the plan, how will the EUTF ascertain from public employers and public employees, their respective definitions of “affordable” and when will this be made available to the consultant?

A12. The term ‘affordable’ has not been defined in statute or rule.

Q 13. Page 23, Section 4.02C, New EUTF Contracts and Benefit Plan, how many RFP does the EUTF contemplate requiring? If this number is not available, will the EUTF pay for additional RFP in excess of the set amount covered in the consultant’s “Annual Fees”?

A13. The contracts with the carriers will likely expire on July 1, 2013. It is expected that the contracted benefits consultant prepare an RFP for each of EUTF’s benefit plans and any new plans approved by the Board of Trustees. EUTF will not pay additional monies for RFPs – it will be part of the ‘annual fee.’

Q14. Page 23, Section Four, 4.02C, when the term “such other date as designated by the Board” becomes the suspense date, how much lead time will the Board give the consultant to meet the request?

A14. The Board of Trustees will give the consultant as much time as possible under the particular circumstances.

Q15. Page 24, Section 4.02D1, Program Management, as used in the last sentence, please define “assist” as it relates to training. What specific services will the benefit consultant be required to provide?

A15. The consultant will be expected to work side-by-side with the EUTF staff, except for the Reference Guides, which is covered in Section 4.01D2.

Q16. Page 24, 4.02D2, Program Management, this appears to be new to the scope of work required by the EUTF. Please confirm that this is a new requirement and the EUTF will be responsible for printing and distribution expense.

A16. This is new and EUTF will pay for the printing and distribution.

Q 17. Pages 24 and 25, Section Four, 4.02D2 and 4.02D5: Section 4.02D2 makes the consultant’s responsibility to prepare the open enrollment materials by January 31 or as designated by the Board and Section 4.02D5 tasks the consultant to review the EUTF’s open enrollment material by January 15 or as designated by the Board. Which paragraph is applicable?

A17. The correct date is January 15th. However, both paragraphs refer to “or such other date as specified by the Administrator”.

Q18. Page 25, Section 4.02D3, Program Management, as used in the second sentence, please define “assist” as it relates to the rest of the sentence. Is the EUTF seeking a technology solution to redesign their website or requesting directional consulting advice?

A18. The EUTF is seeking both a technology solution to redesign their website and requesting directional consulting advice.

Q19. Page 25, Section 4.02D4, Program Management, please provide a detailed description of the scope of training, number of sessions, number of participants and will the EUTF require training conducted by a qualified attorney?

A19. A detailed description, number of sessions, and number of participants is unknown at this time. The EUTF expects the consultant to provide trainers who are subject matter experts in the areas being trained.

Q20. Page 25, 4.02D6, Program Management, does the EUTF require qualified legal advice or directional consulting advice?

A20. The EUTF expects the consultant to provide advice that is up-to-date and accurate. If a recommendation by the benefits consultant involves an analysis of the impacts of laws, rules, regulations, and case law on the EUTF and how to address them, and that analysis involves legal advice, then “Yes”.

Q21. Page 26, Section Four, 4.02E1h, forty copies for the annual report but 48 is listed in parenthesis. Which number of copies is correct?

A21. The correct number is forty-eight (48) copies for the annual report.

Q22. Page 26, 4.02E2, Quarterly and Special Reports, please provide the estimated number of reports to be generated by the consultant. Will the EUTF pay for additional special reports on a time and expense basis that are in excess of the set amount covered in the consultant’s “Annual Fees”?

A22. The number of special reports is unknown at this time. The EUTF will not pay additional monies for the special reports.

Q23. Page 27, Section 4.02G1, Meetings, how many Board, Committee and Special meetings will the EUTF require the Primary Consultant to attend? Will the EUTF pay for additional meetings on a time and expense basis that are in excess of the set amount covered in the consultant’s “Annual Fees”?

A23. The Board of Trustees meets monthly and sometimes more frequently. The subcommittees meet on an as-needed basis. The EUTF will not pay additional monies for meetings.

Q24. Page 28, Section 4.02H, HIPAA Privacy and Security Rules, does the EUTF require a formal legal review by a qualified attorney of their privacy and security policies and procedures?

A24. It is expected that the consultant provide subject matter experts to assist the Board in its efforts to comply as stated in Section 4.02 H.

Q25. Page 28, Section 4.02I, COBRA, does the EUTF require a formal legal review by a qualified attorney of their COBRA policies and procedures?

A25. It is expected that the consultant provide subject matter experts to assist the Board in the COBRA area.

Q26. Page 28, Section 4.02J, General Consulting Advice, please quantify the number of hours and accessibility requirements the EUTF desires. Does the EUTF require a Hawaii-based consultant be available for in-person meetings, phone calls, training, etc. during normal State of Hawaii business hours?

A26. The EUTF expects the consultant to be available on a daily basis to provide advice and/or guidance to the EUTF Administrator and Board of Trustees. It is preferred that the consultant be available for in-person meetings, calls, etc., during normal State of Hawaii business hours.

Q27. Page 29, Section 4.02K1, Optional Additional Services, please confirm the EUTF will be responsible for providing the appropriate space for the open enrollment sessions. How many open enrollment sessions are required?

A27. The EUTF will make space arrangements for the open enrollment sessions. At this time, it is unknown how many open enrollment sessions will be required.

Q28. Page 32, Section 5.041, Insurance, will the EUTF agree to limit the benefit consultant's liability for services rendered under the contract to an amount equal to the consultant's annual fee?

A28. No.

Q 29. Appendix E, Page 146, #6, what is the third type of sample you would like for us to submit?

A29. It is up to the offeror what the third sample will be.

Q30. Appendix E, Page 146, #9, because all of the public employee-organizations already belong to the EUTF, with the exception of the Teacher's Association (until January 1, 2011 when they are to rejoin the EUTF), would it be ok to list our clients who are public employee organizations on the mainland?

A30. No. However, #9 states you may also list "insurance carriers performing benefit plan services for such organizations."

Q31. Appendix E, Page 152, Schedule 13;1, Consultant Fees for Contract Period, will the EUTF accept a proposal whereby pricing is based upon a fixed dollar amount for a specific number of meetings, reports, analysis, trainings, etc. and work performed in excess of the stated amounts can be billed to the EUTF on a time and expense basis?

A31. No.

Q32. Appendix E, Page 152, Schedule 13;2, Open Enrollment Reference Guide and Open Enrollment Sessions, please confirm the fees in Schedule 13, Paragraph 2 for optional additional services are to encompass Open Enrollment Session only as requested in 4.02;K;1 and does not include producing enrollment reference guides.

A32. Appendix E, Page 152, Schedule 13-2, should only include open enrollment sessions. The reference guide work required in the RFP should be priced into the annual fixed fees.